

# **“HJR 28 – Studying Alternative Delivery”**

**facilitated by:**

**Architecture & Engineering Division, Department of Administration  
State of Montana**



## **Organizing the Study Effort**

### **MISSION:**

- To objectively and adequately analyze the available alternative delivery systems for construction projects and their applicability to Montana per the request of HJR 28 of the 58<sup>th</sup> Legislative Session and present the results to the 59<sup>th</sup> Legislature.

### **GOALS:**

- Define “best-value” contracting.
- Define the current state of construction procurement in Montana.
- Garner a wide-range of participation from “stakeholders” in the state.
- Gather and introduce data from as many sources as deemed viable.
- Accurately analyze and present the findings without bias to any particular methods.

### **DIRECTION:**

- Identify stakeholders and participants.
- Develop surveys for the Montana design profession and construction industry to provide their input.
- Contact public and private entities regarding their procurement procedures, guidelines, and laws.
- Attend conferences that present the alternative delivery processes available to gather an appropriate understanding of their application.
- Meet with parties as appropriate to discuss avenues of research.

### **PLANS:**

- See charts below.

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<b>RESEARCH/DATA GATHERING</b>	<b>Target Date</b>	<b>Date Completed</b>	<b>Responsible/Notes</b>
Chair: Russ Katherman			
Define “best-value” construction contracting			
Identify the type of research and data necessary to be effective			
Identify the sources and organizations where data may be available			
Identify conferences, seminars, and/or speakers on alternative methods			
Identify financial impacts/needs (if any) for research/data gathering <ul style="list-style-type: none"> <li>• Sample contracts</li> <li>• Publications</li> <li>• Seminars</li> <li>• Reproduction of findings/data</li> </ul>			
Assign research and data gathering tasks with completion deadlines			
Gather all research and data			
Digest and summarize findings			
Present draft summary of findings to all participants			
Discuss findings, categorize data accordingly, and make recommendations for state practice			
Develop suggested practices and legislation; disseminate for review by participants			
Receive comments and additional suggestions			
Finalize recommendations for presentation to the 59 <sup>th</sup> Legislature			
Suggested Public Entities: <ul style="list-style-type: none"> <li>• Federal (GSA)</li> <li>• States</li> <li>• Universities</li> <li>• Cities/Municipalities/Counties</li> </ul>			
Suggested Private Entities: <ul style="list-style-type: none"> <li>• Large construction firms</li> <li>• Montana contractors</li> <li>• Montana design firms</li> </ul>			
Suggested Associations: <ul style="list-style-type: none"> <li>• DBIA</li> <li>• AGC</li> <li>• AIA/PES</li> <li>• COAA</li> <li>• AAA (for dispute resolution)</li> <li>• Construction Institute</li> </ul>			

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<b>STUDY GROUP MEMBERS</b>	<b>Target Date</b>	<b>Date Completed</b>	<b>Responsible/Notes</b>
Chair: Russ Katherman			
Possible Participating Groups: <ul style="list-style-type: none"> <li>Montana Contractors Association</li> <li>AIA of Montana</li> <li>Engineers Council of Montana</li> <li>Montana Technical Council</li> <li>Legal Profession</li> <li>Sureties/Insurers</li> <li>Legislators</li> <li>Other State Agencies</li> </ul>			
Determine Participating Groups			
Contact Groups to determine interest and participants			
Identify Individual Participants			
Develop Contact List			
Contact participants regarding meetings, surveys, data gathering			
Identify those who will assist in research and data gathering			
Assign research and data gather tasks with completion dates			
Identify those who will assist in analysis of the data and developing report of findings			
Identify those who will review the summary of findings recommendations			
Identify those who will present findings to the 59 <sup>th</sup> Legislature			

<b>MEETINGS</b>	<b>Target Date</b>	<b>Date Completed</b>	<b>Responsible/Notes</b>
Chair: Russ Katherman			
Need to identify participating groups and then individuals			
Identify financial impacts/needs (if any) for meetings <ul style="list-style-type: none"> <li>Lodging</li> <li>Travel</li> <li>Per diem</li> <li>Meeting locations</li> </ul>			
Identify meeting locations			
First Meeting: define mission, goals, assign research/data gathering tasks, contractor			

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concerns, design profession concerns, schedule, and end-product to be provided to the 59 <sup>th</sup> Legislature. <ul style="list-style-type: none"> <li>Maintain periodic contact with participants to ensure progress is being made in gathering data</li> <li>Gather data into summary findings; make copies of all pertinent data</li> <li>Issue summary findings to all participants for review and comment</li> </ul>			
Second Meeting: present summary of findings; discuss comments, revisions, need of further research, schedule, and end-product to be provided to the 59 <sup>th</sup> Legislature. <ul style="list-style-type: none"> <li>Revise summary findings per meeting</li> <li>Prepare draft of final document</li> <li>Issue revised summary for review and comment</li> </ul>			
Third Meeting: completion of final draft, finalize strategy for presentation to the 59 <sup>th</sup> Legislature			

<b>RESULTS REPORTING</b>	<b>Target Date</b>	<b>Date Completed</b>	<b>Responsible/Notes</b>
Chair: Russ Katherman			
Identify the format of what is to be presented to the legislature			
Identify the participants presenting the findings to the legislature			
Quality of materials?			
Format of materials?			
Reproduction costs?			